

Travel Sentiment

Summer 2022

Agenda

- Current State of Travel
- Reasons for Concern
- Reason to Be Optimistic



Tripadvisor



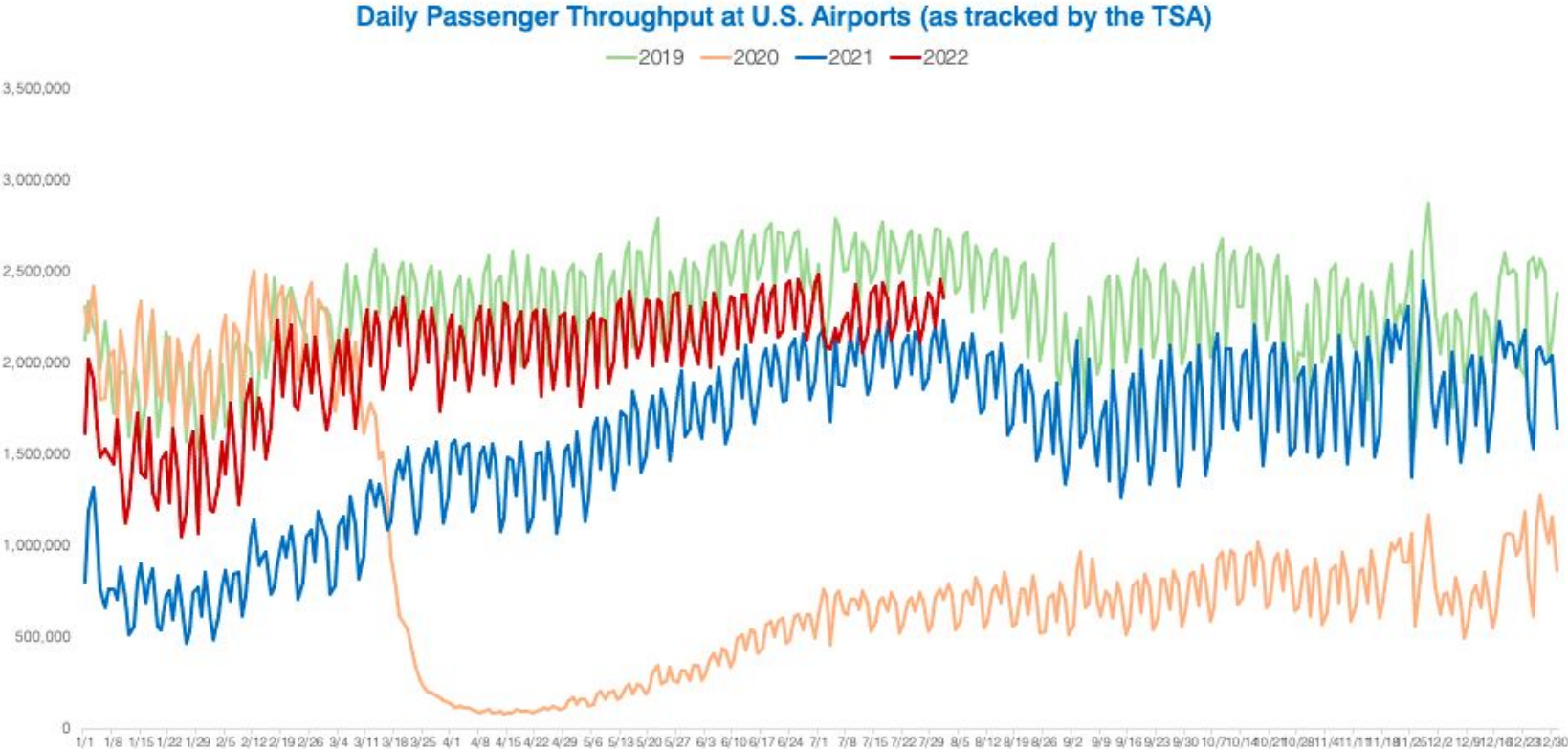
Skift.

Love



Current State of Travel

TSA Daily Air Travel

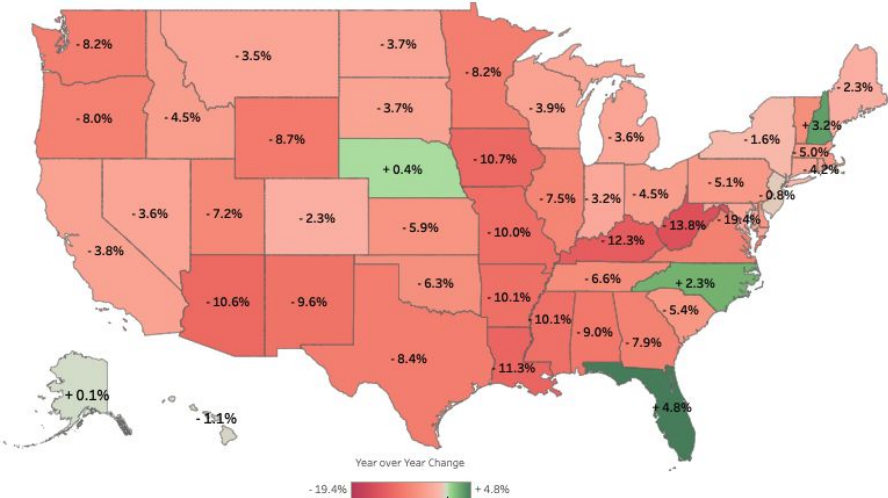


Arrivalist Daily Travel Index



arrivalist.com | US Daily Travel Index

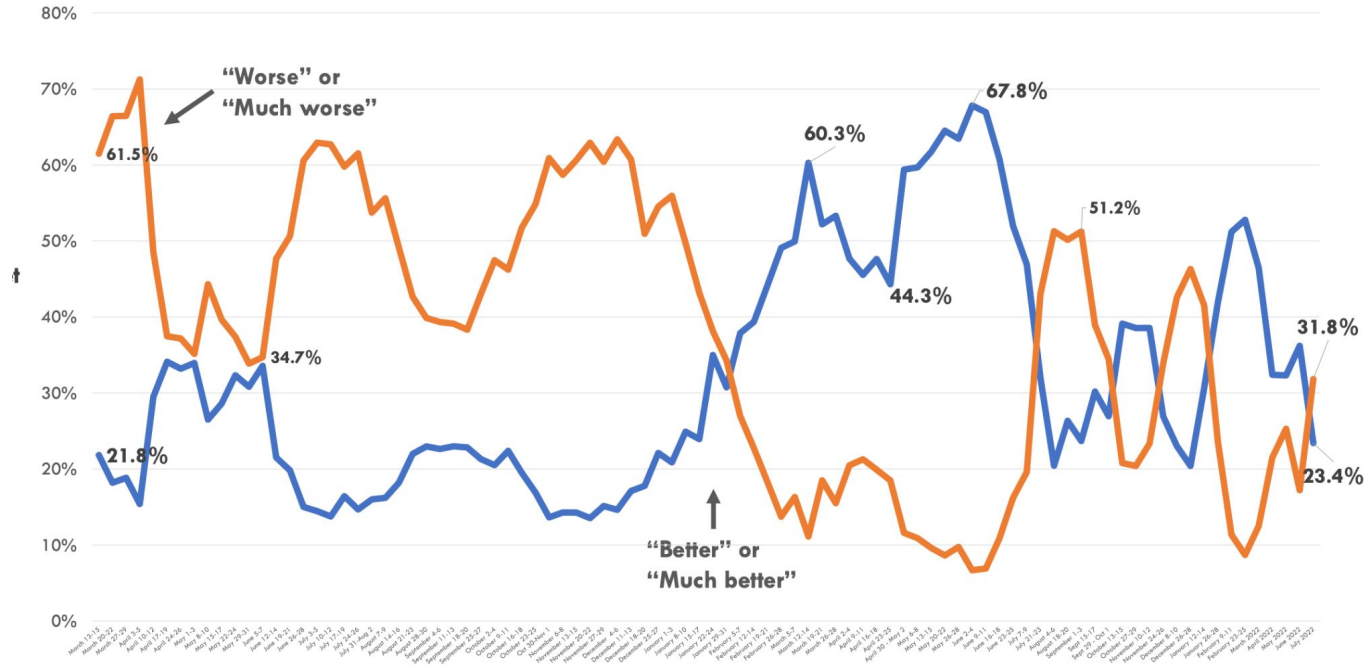
Below map shows year-over-year change based on destination state.



Select Period	Compare Period	Trip Type
Last 28 Days	2022 vs 2019	All



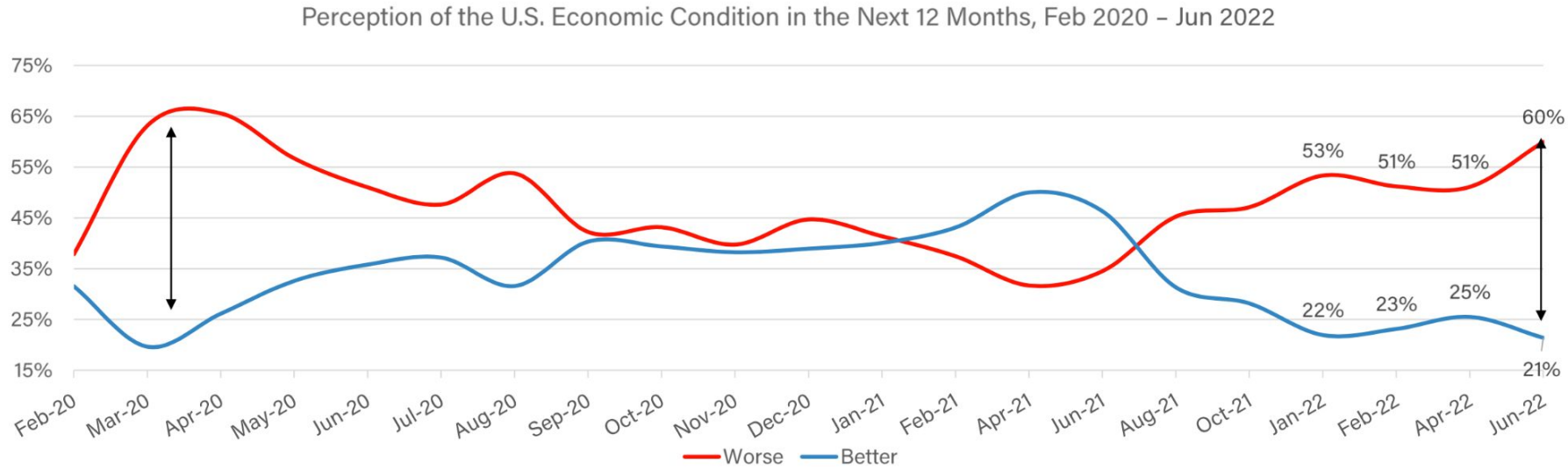
Expectations for the Coronavirus Outbreak



Reasons for Concern

27.6% of travelers feel that now is a good time to spend money on leisure travel. At this moment last year, 44.6% of travelers felt that it was a good time to spend money on leisure travel.

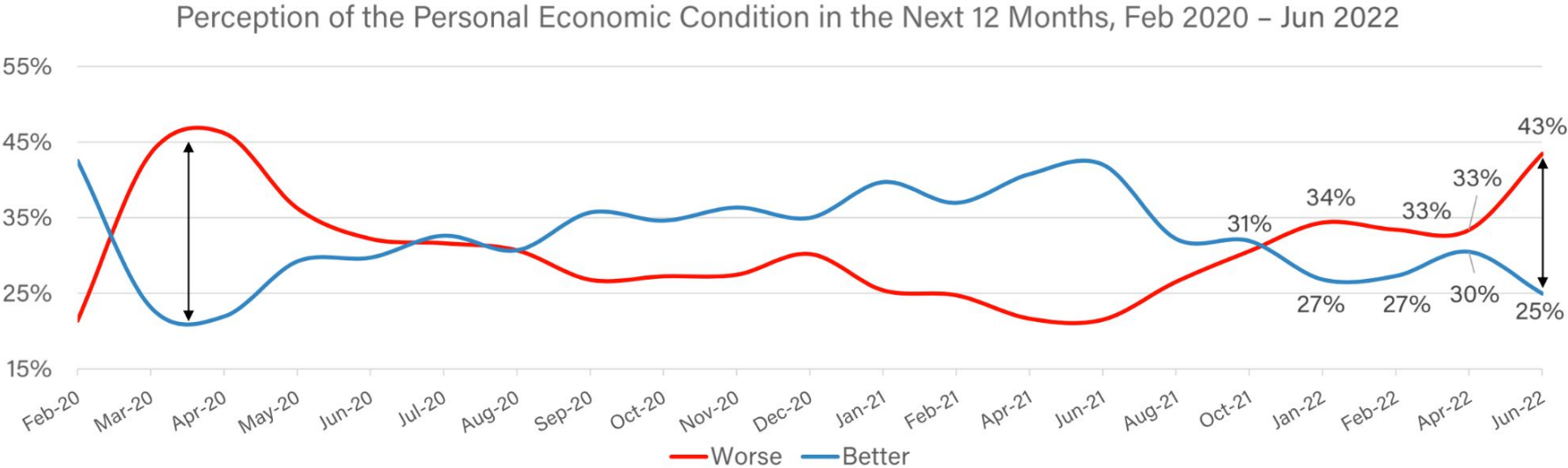
Anxiety About the Economy



Monthly $n = \sim 1000$

62% of adults said they feel that the US is already in a period of contraction, with an additional 19% believing that the country is headed toward one.

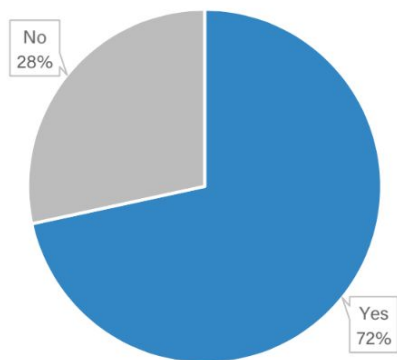
Personal Financial Condition



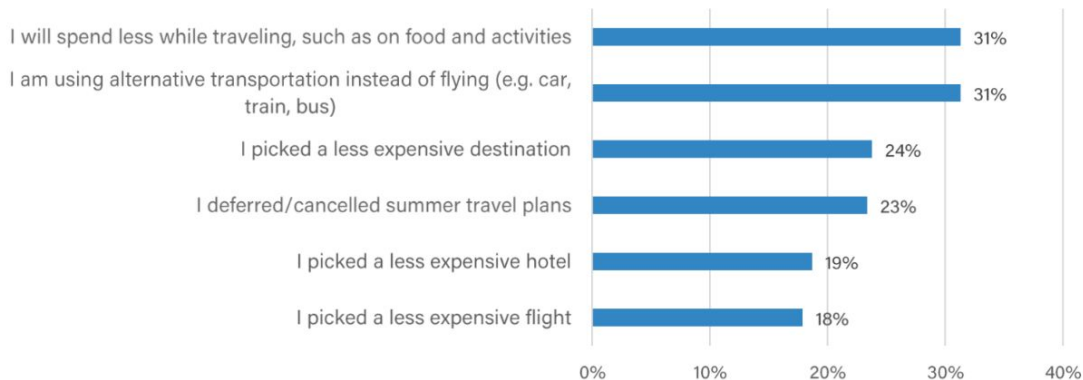
Monthly n = ~1000

Impact of Increased Prices

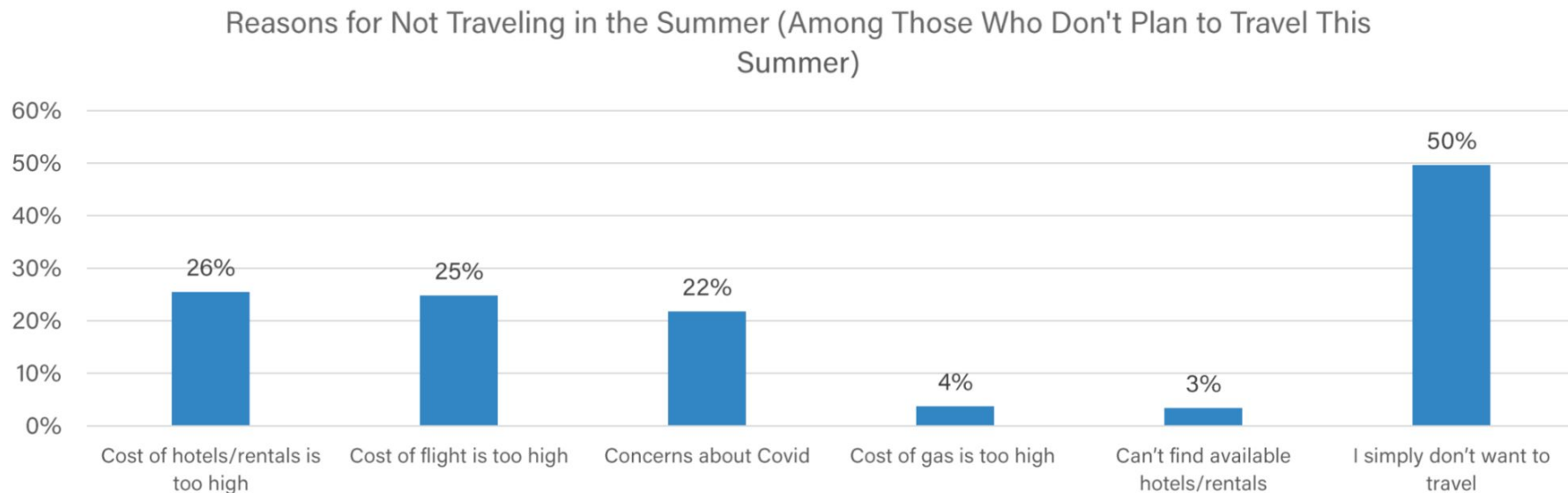
% Whose Travel Plans Are Affected by High Travel Price, June 2022



Ways That Summer Travel Plans Are Impacted, June 2022



Cost a Leading Reason for Those Who Don't Plan to Travel



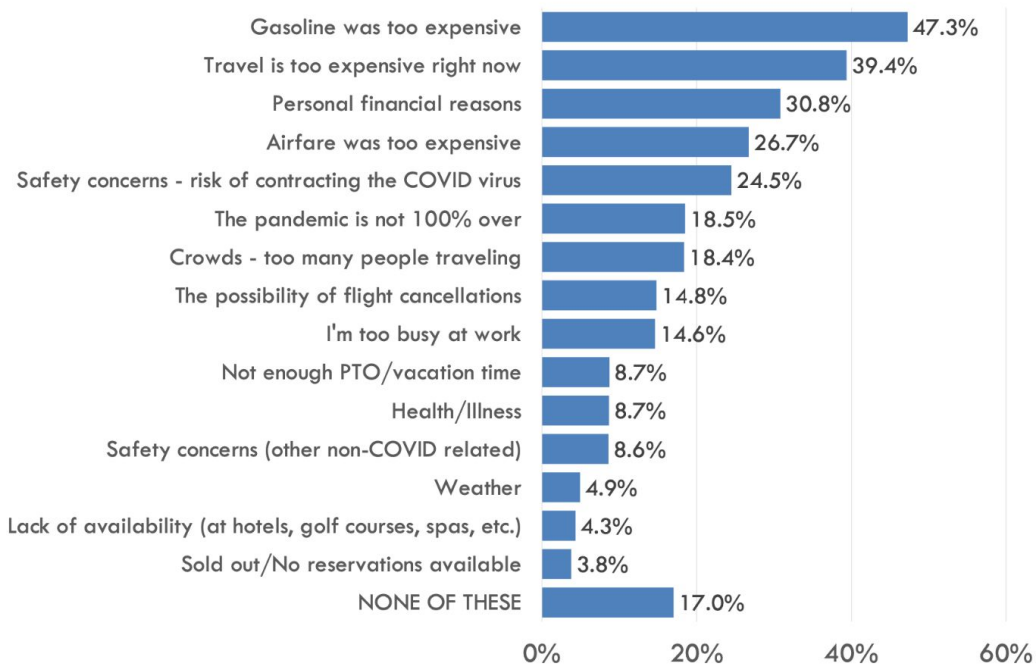
30.5% of survey respondents stated that the recent inflation in consumer prices has led them to cancel an upcoming trip. *This is down from last month's research that found 36.3% of people had cancelled a trip due to inflation.*

Deterrents to Travel

Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

(Base: All respondents, 4,040 completed surveys.)

Data collected July 15-22, 2022.)



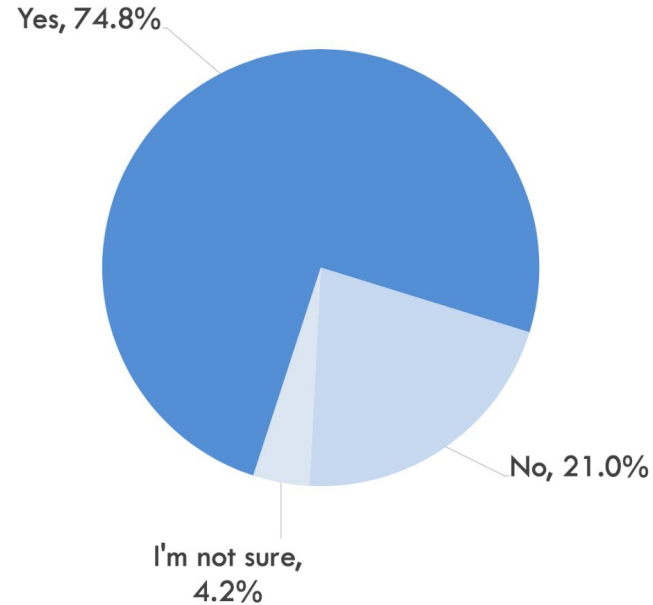
Awareness of Airline Industry Issues

The U.S. air travel system has recently been experiencing significant issues such as flight cancellations, delays and long security lines. Labor shortages have caused the major air carriers to cancel many flights, creating problems at airports.

Question: Before taking this survey, were you aware of this situation in air travel?

(Base: All respondents, 4,040 completed surveys.)

Data collected July 15-22, 2022.)



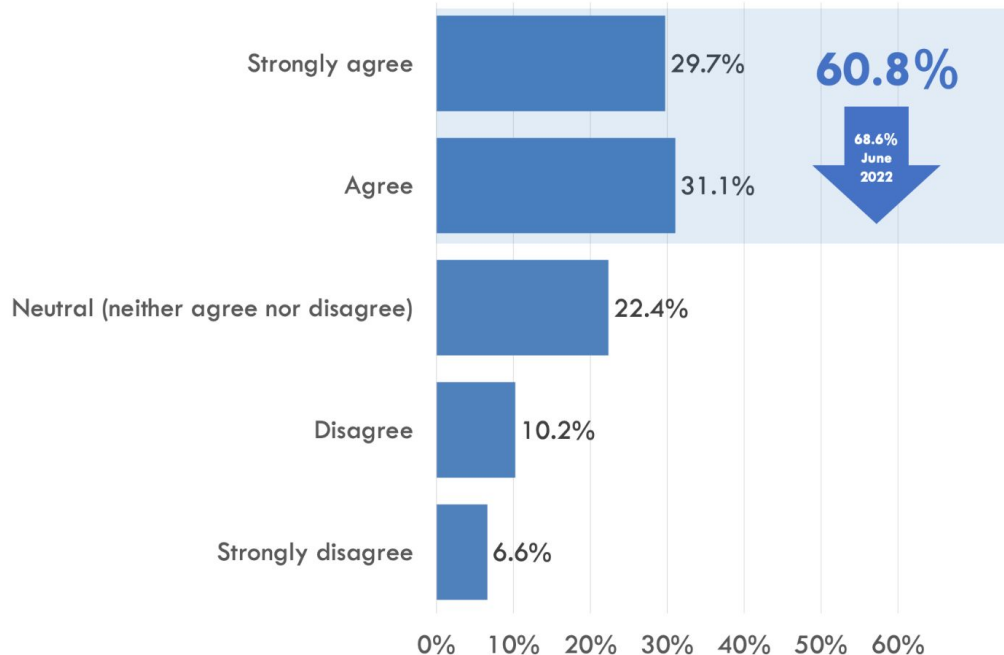
30.4% of travelers agree that due to airline's recent issues, they have decided to not travel by air this summer. *37% disagree with this statement.*

Gasoline Prices and Travel Proximity

Question: How much do you agree or disagree with the following statements?

If gasoline prices don't come down, I'll be taking fewer road trips this summer/fall.

*(Base: All respondents, 4,040 completed surveys.
Data collected July 15-22, 2022.)*



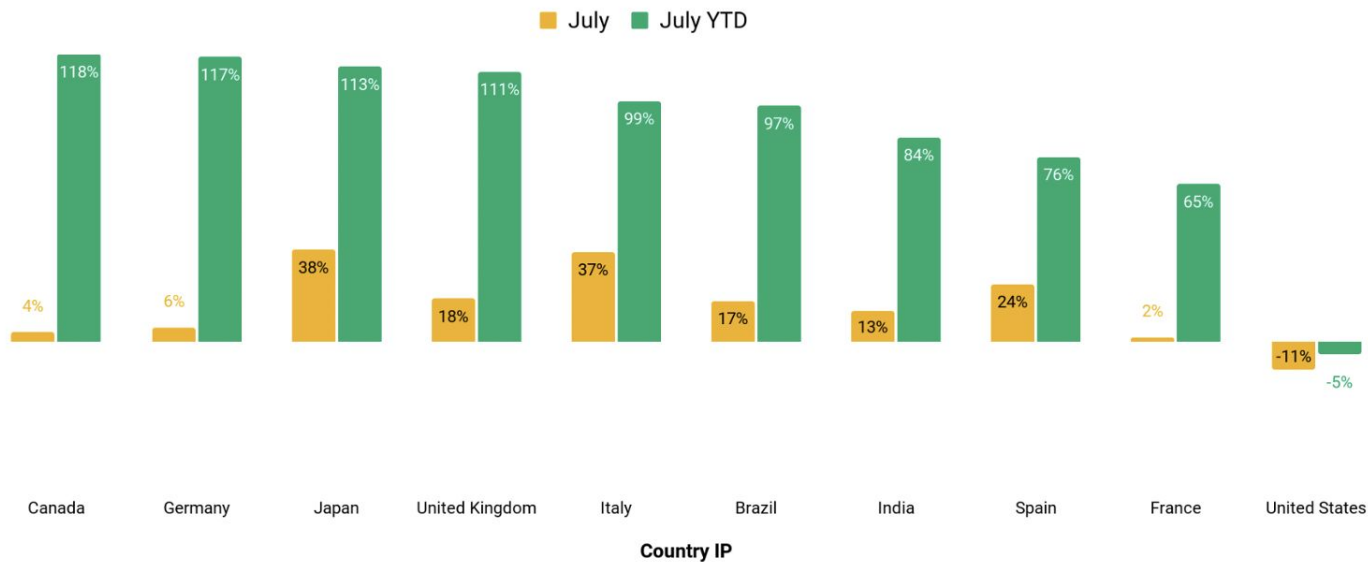
63.3% of travelers agree that if gas prices don't come down, they will be staying closer to home on their road trips this summer/fall. *Only 15.6% disagree.*

31% of people said they are more likely or much more likely to travel outside the U.S. due to the relaxed COVID-19 requirements to re-enter the U.S.

YTD Hotel Clickers Compared to 2021

Hotel Clickers Growth Rates, July and YTD 2022 vs. 2021

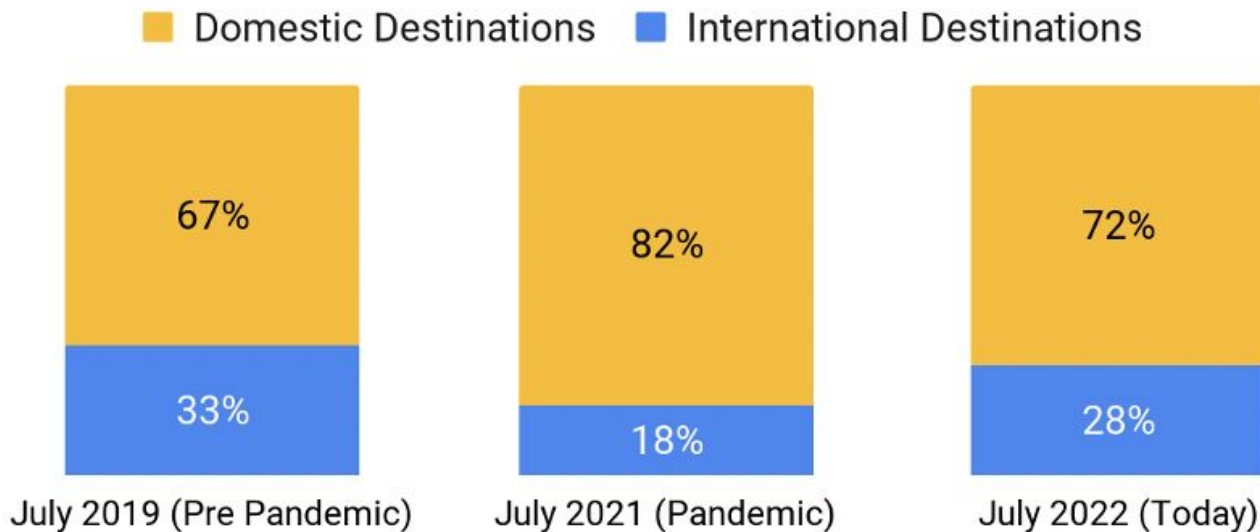
Country IPs



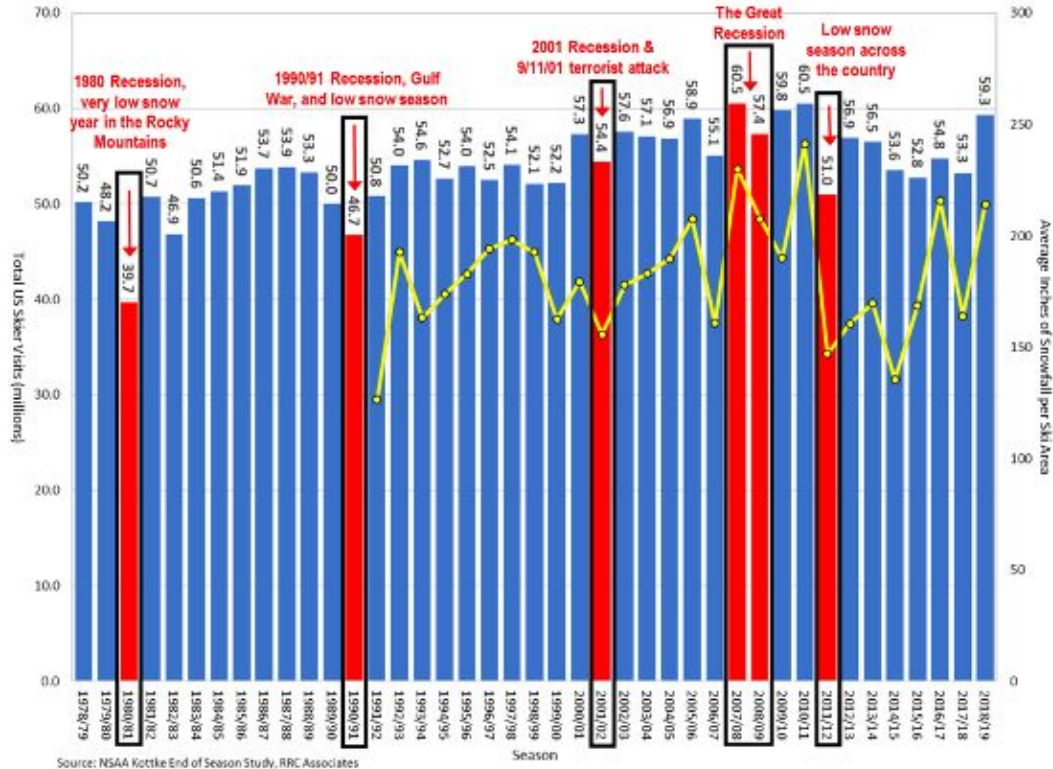
Source: Internal data; based on Hotel Clickers, July (7/1/21-7/31/21; 7/1/22-7/31/22); July YTD (1/1/21 - 7/31/21; 1/1/22-7/31/22)

Share of Travel Intent Over Time: Tripadvisor

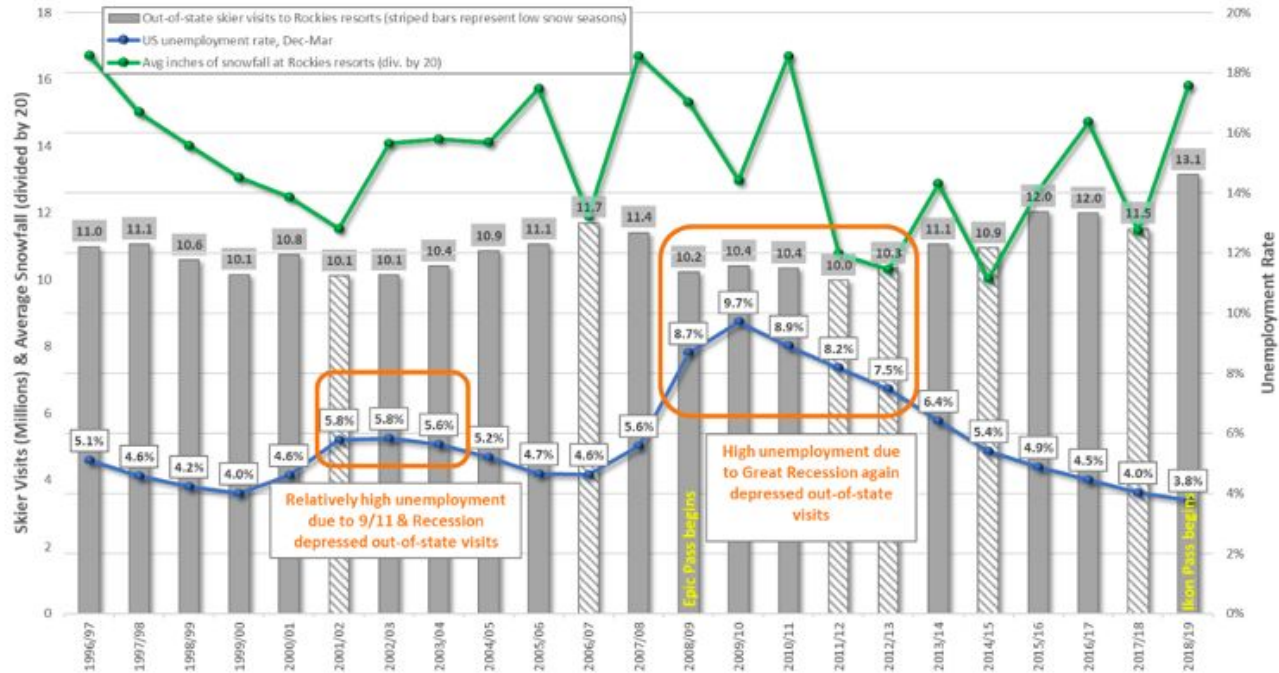
Share Distribution of Travel Intent over time | N. AMER



NSAA Skier Visit Analysis

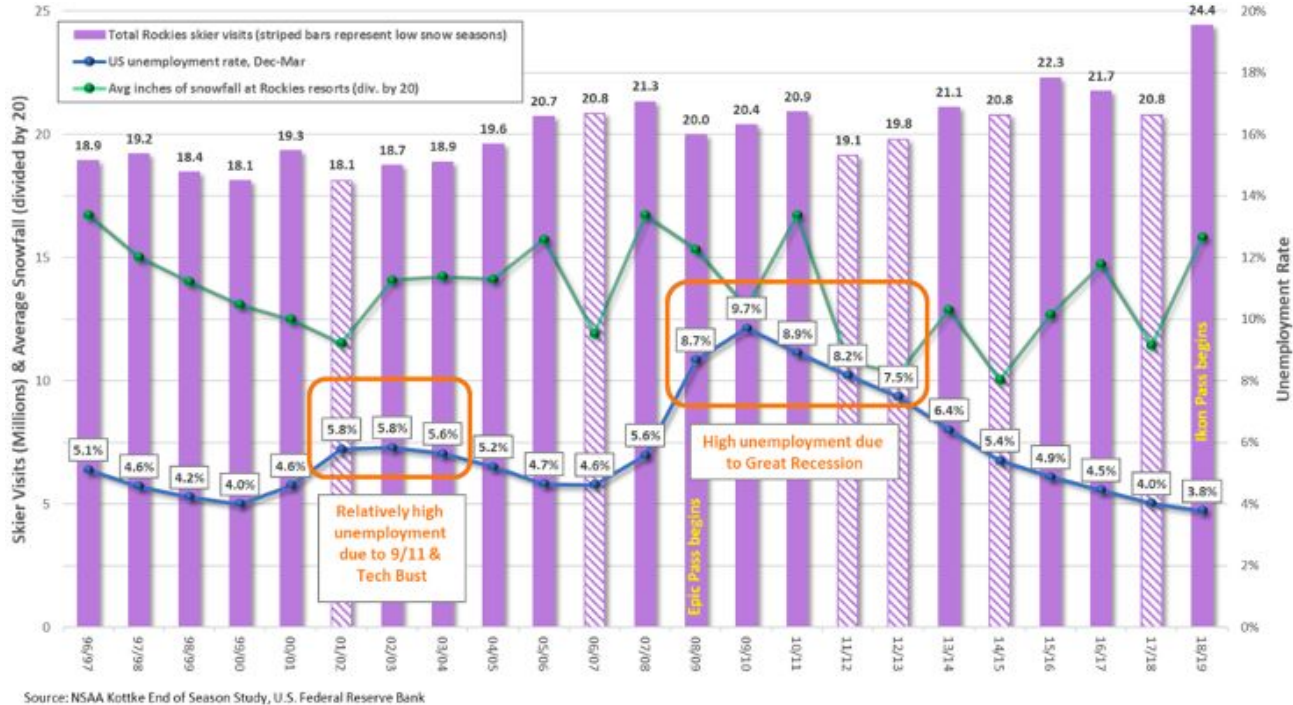


NSAA Skier Visit Analysis



Source: NSAA Kottke End of Season Study, U.S. Federal Reserve Bank

NSAA Skier Visit Analysis





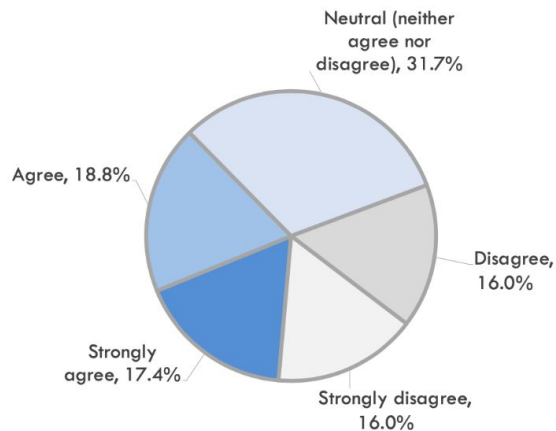
Reasons to be Optimistic

92% of American survey respondents have travel plans in the next six months.

Conferences

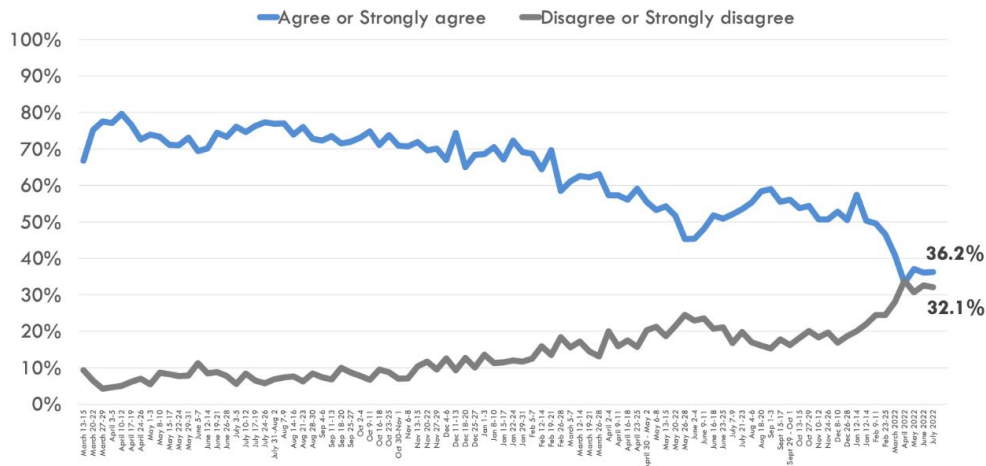
How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



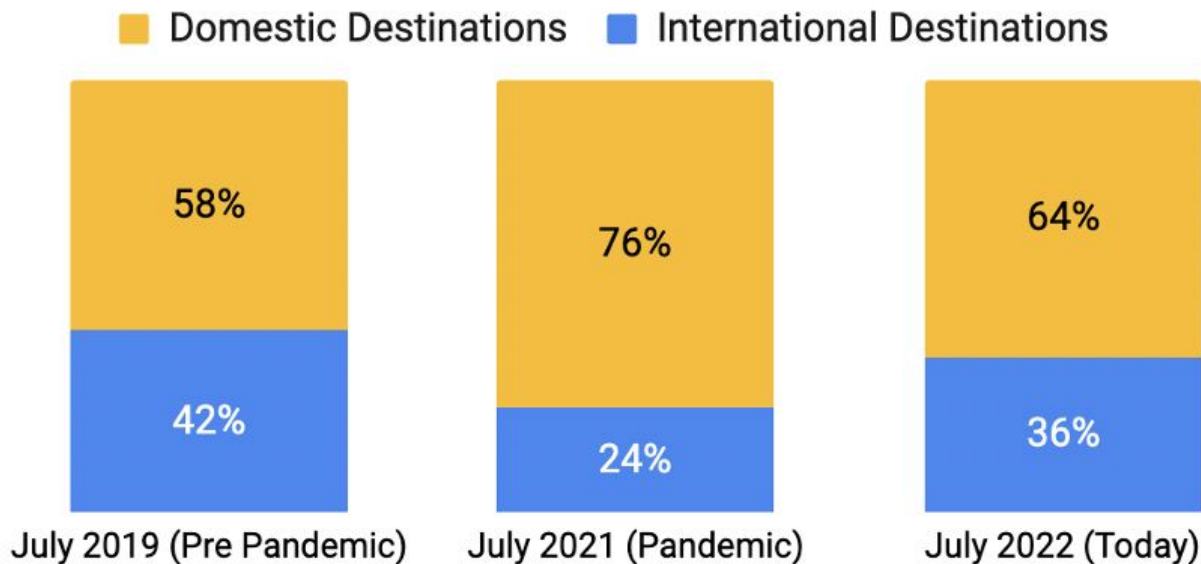
(Base: All respondents, 4,040 completed surveys. Data collected July 15-22, 2022.)

Historical data



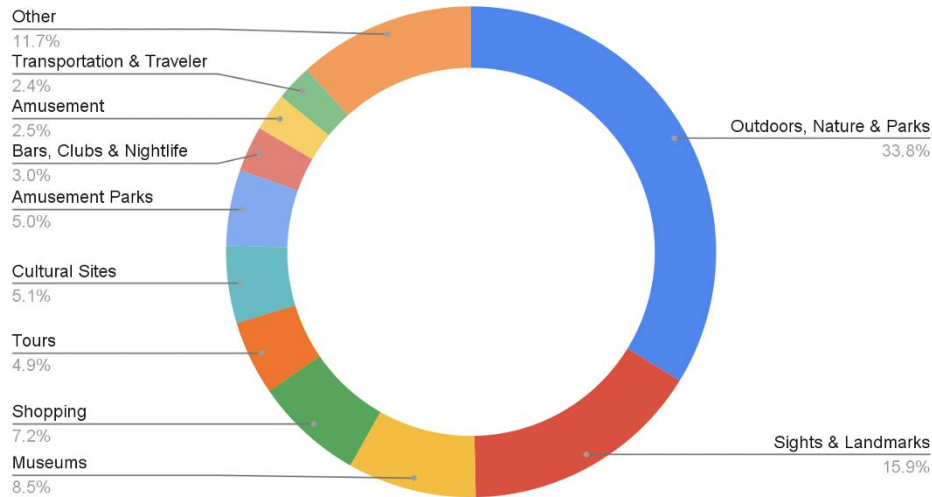
Share of Travel Intent Over Time: Tripadvisor

Share Distribution of Travel Intent Over Time | GLOBAL



Distribution of Attraction Type by Page View

Distribution of attraction type by page views, July 2022

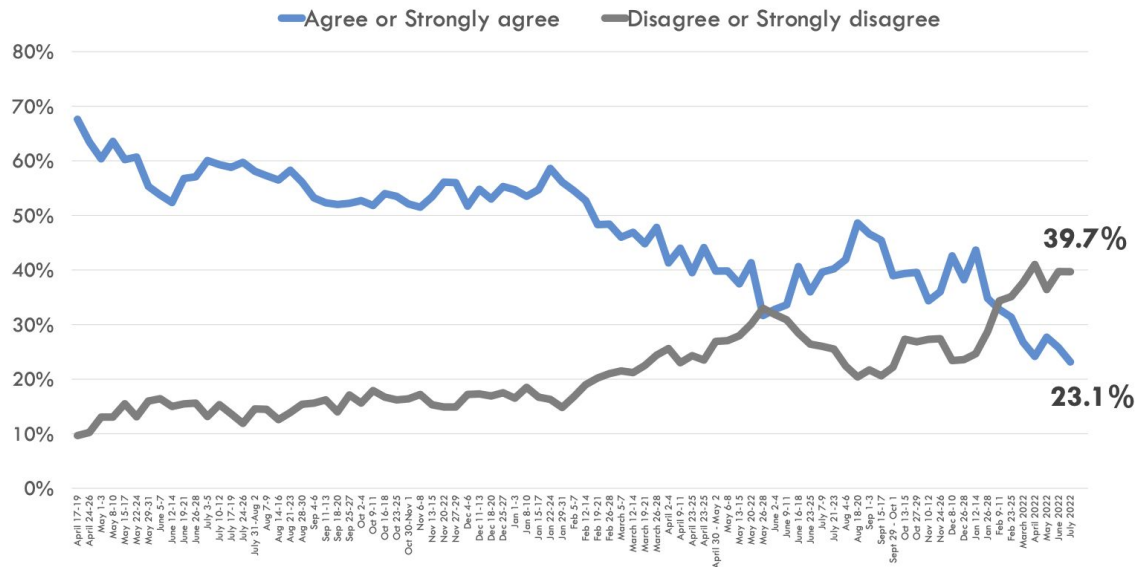


Source: Tripadvisor internal data, July 1-31, 2022, July 1-31, 2019

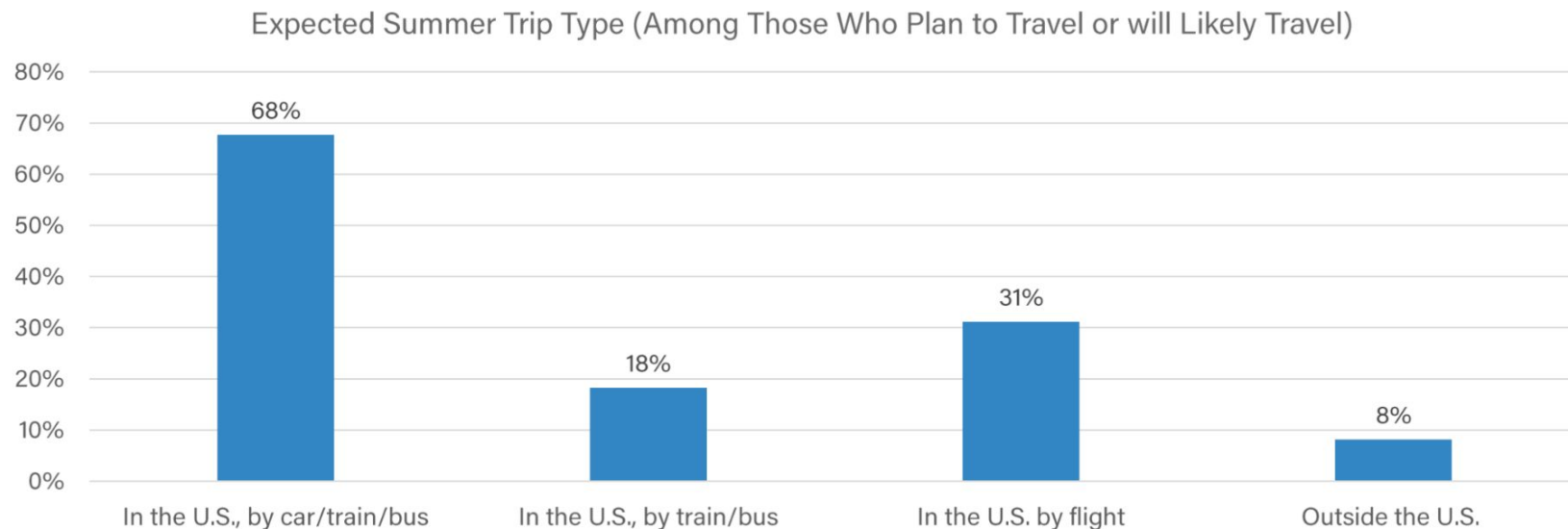
Attraction Type	July '22 v. '19 Change in Share (In % points)
Outdoors, Nature & Parks	2.9%
Sights & Landmarks	0.3%
Amusement Parks	0.2%
Food & Drink	0.2%
Fields & Stadiums	0.2%
Cultural Sites	0.1%
Casinos & Gambling	0.1%
Zoos & Aquariums	0.0%
Museums	-0.1%
Transportation & Traveler resources	-0.1%
Classes & Workshops	-0.1%
Amusement	-0.2%
Performances, Theater & Concerts	-0.2%
Adventure	-0.2%
Bars, Clubs & Nightlife	-0.3%
Shopping	-0.5%
Spas, Wellness Health	-0.6%
Tours	-1.7%

Travelers in Community Wanted vs Unwanted

Historical data



Road Trips Will Continue to Dominate for Summer Travel



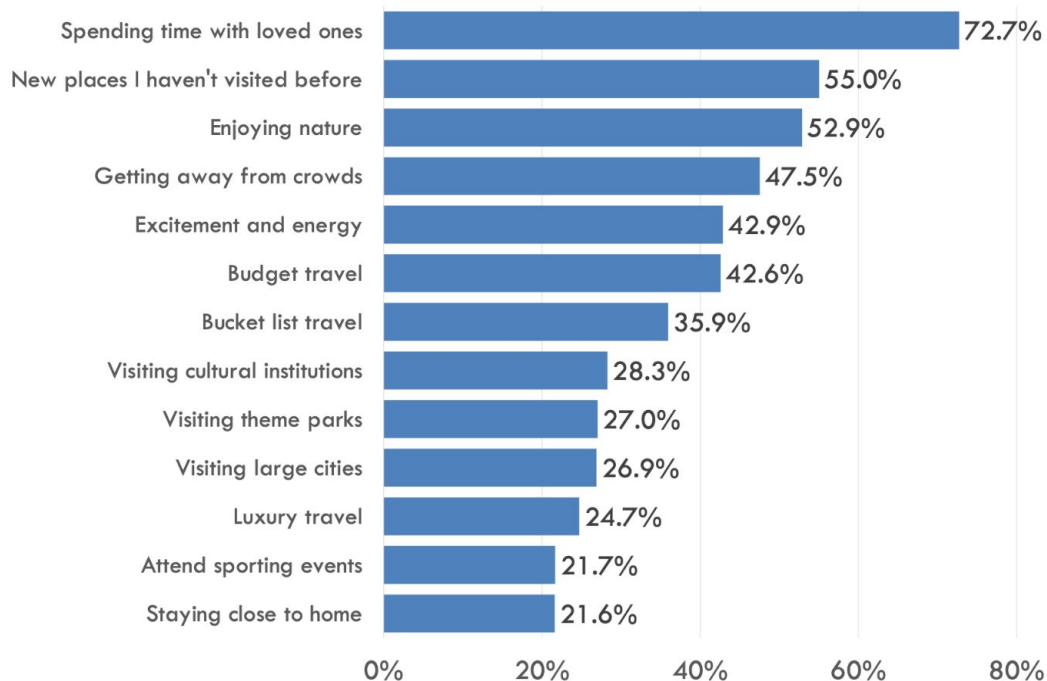
What Travel Experiences Will You Prioritize in Next 12 Months?

Question: Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: All respondents, 4,040 completed surveys.)

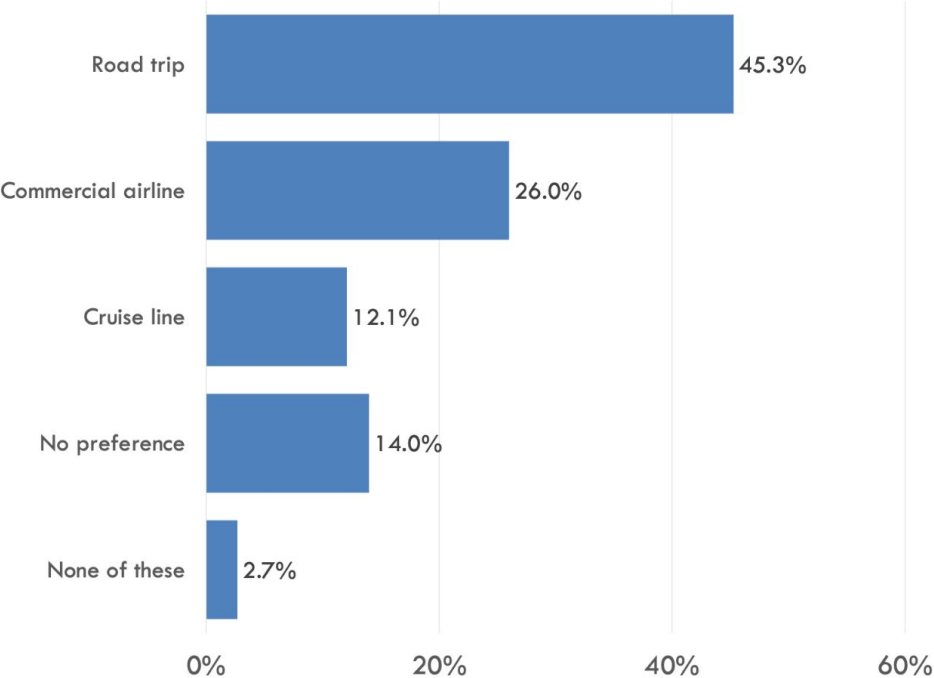
Data collected July 15-22, 2022.)



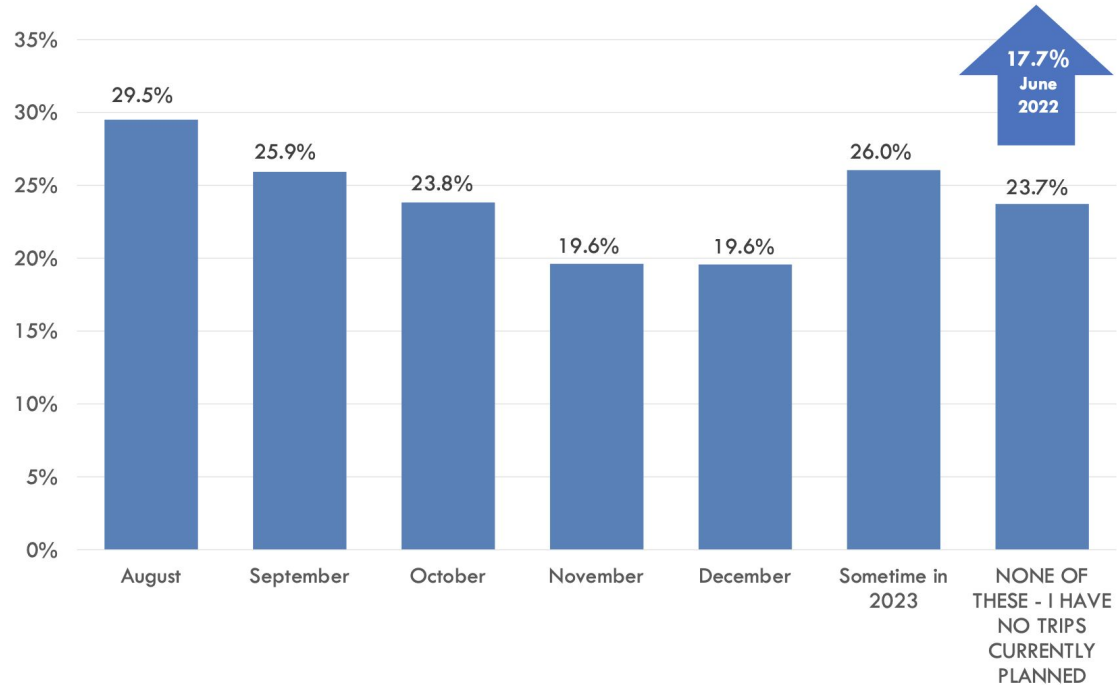
Travel Transportation Preference

Question: Which type of travel do you prefer: Road trip, cruise line or travel by commercial airline?

*(Base: All respondents, 4,040 completed surveys.
Data collected July 15-22, 2022.)*



Month of Planned or Tentatively Planned Trip



Preferred Travel Destination: Western Region vs National

When you compare to the entire sample of responses, Utah is in the 36 position for most desired domestic destinations in the next 12 months.

Preferred Travel Destination: Western Region vs National

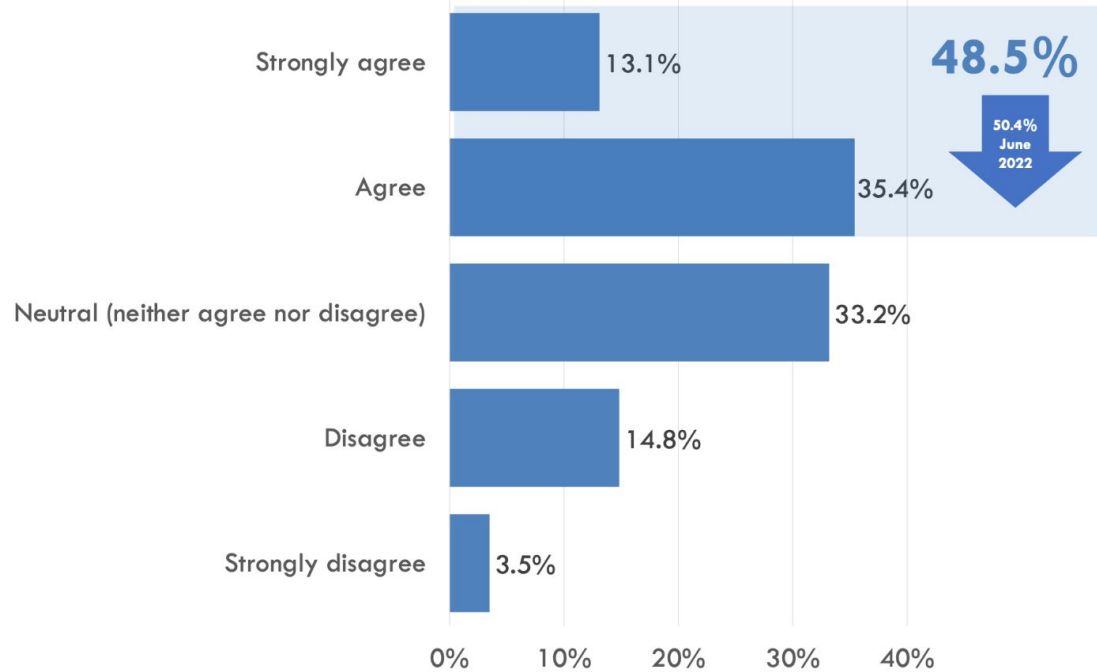
Utah continues to show strongest in the western region, currently the 20th most desired destination for travelers living in the west.

Preference for Active Vacations

How much do you agree or disagree with the following statements?

Statement: I tend to prefer "active time" to "down time" on vacations.

*(Base: All respondents, 4,040 completed surveys.
Data collected July 15-22, 2022.)*

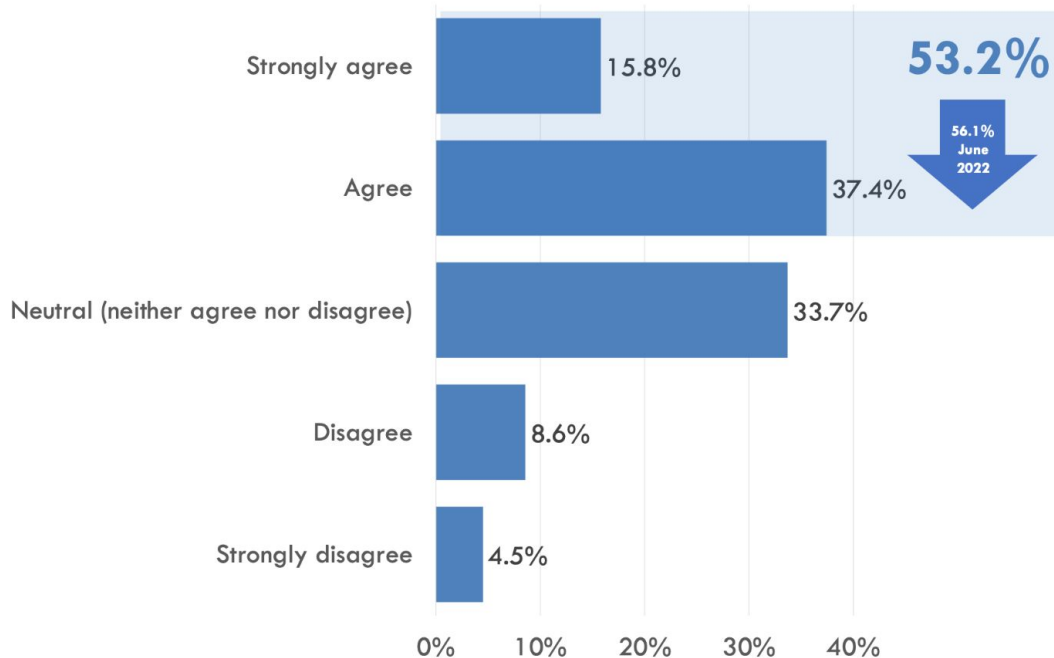


Personal Impact When Traveling

How much do you agree or disagree with the following statements?

Statement: I usually make an effort to limit my personal impact on the environment when traveling.

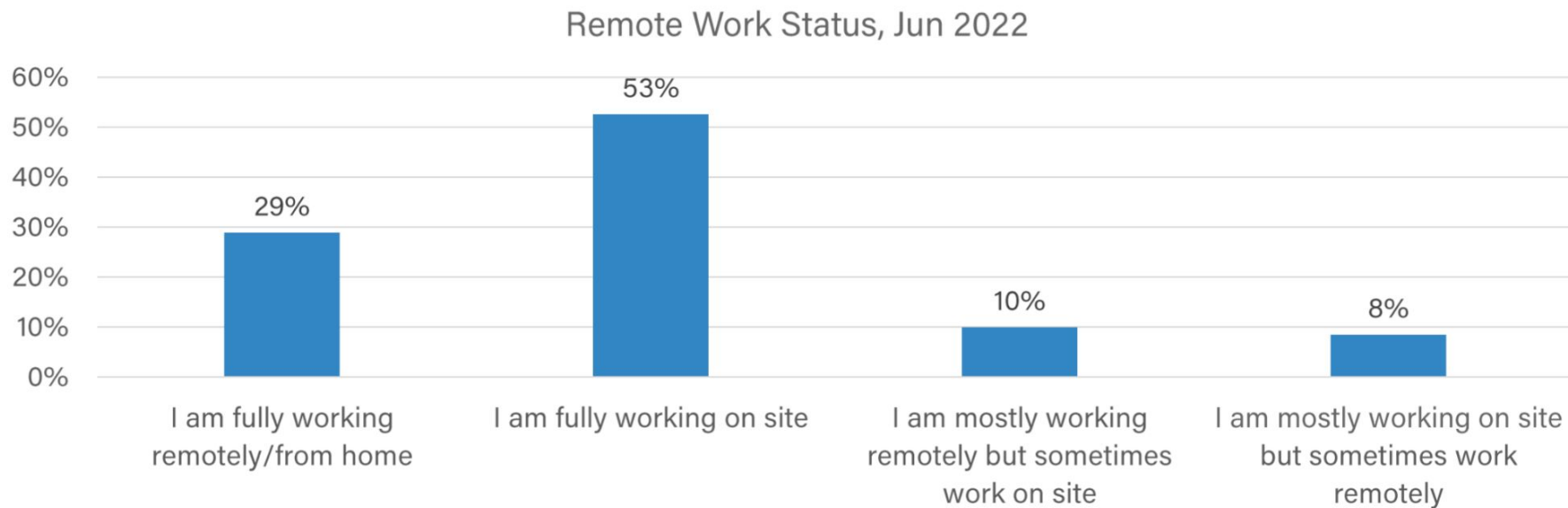
*(Base: All respondents, 4,040 completed surveys.
Data collected July 15-22, 2022.)*



43.5% of travelers claim they usually avoid visiting touristy or overdeveloped places.

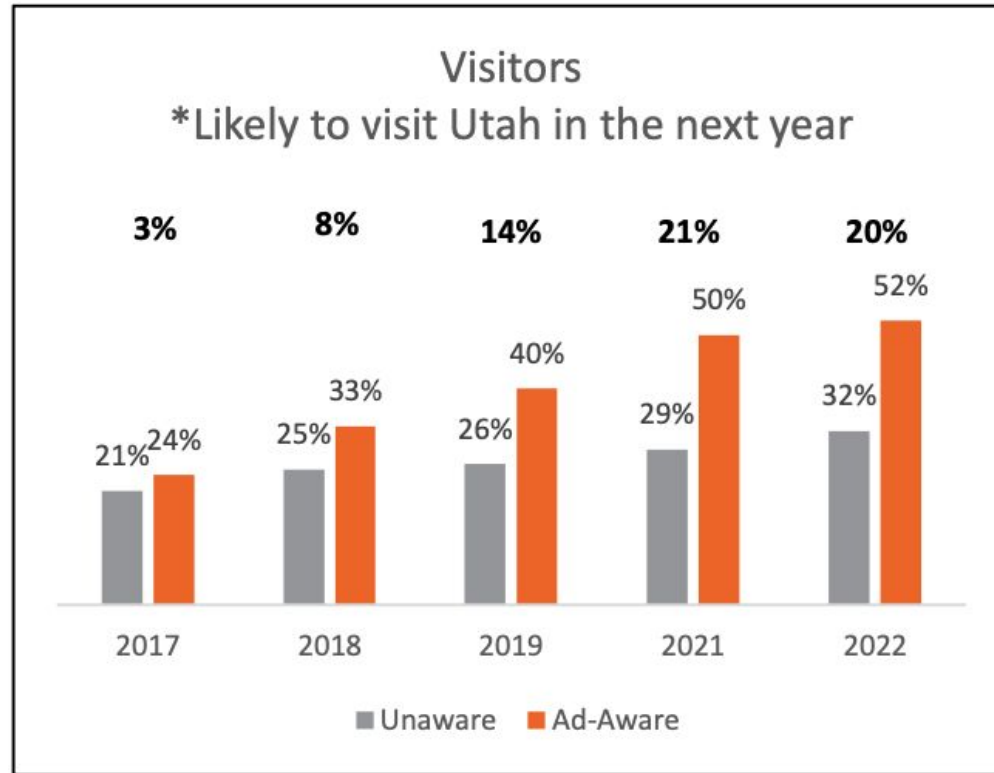
53.7% of travelers will prioritize visiting new places in 2022.

Nearly 30% of American Workers Are Still Remote



23% of remote workers have taken long trips of more than 10 days because of the remote work flexibility.

Intent to travel to Utah in the next 12 months



Future Bookings

WISU '22/'23	2022																	2023					
	September				October					November				December				January					
	5	12	19	26	3	10	17	24	31	7	14	21	28	5	12	19	26	27	2	9	16	23	30
Digital																							
Tripadvisor																							
Competitive Targeting																							
Programmatic																							
Mix of PR Display and RTG CTV+Online video																							
Native																							
Native Static and Native Video (PR & RTG)																							
CTV																							
CTV, Cross Device Display + RTG Display																							
YouTube																							
Possibly Selfserve																							
Social																							
Sparkloft																							
Legacy - SLC Mag																							
Ad Serving																							
Total Media																							

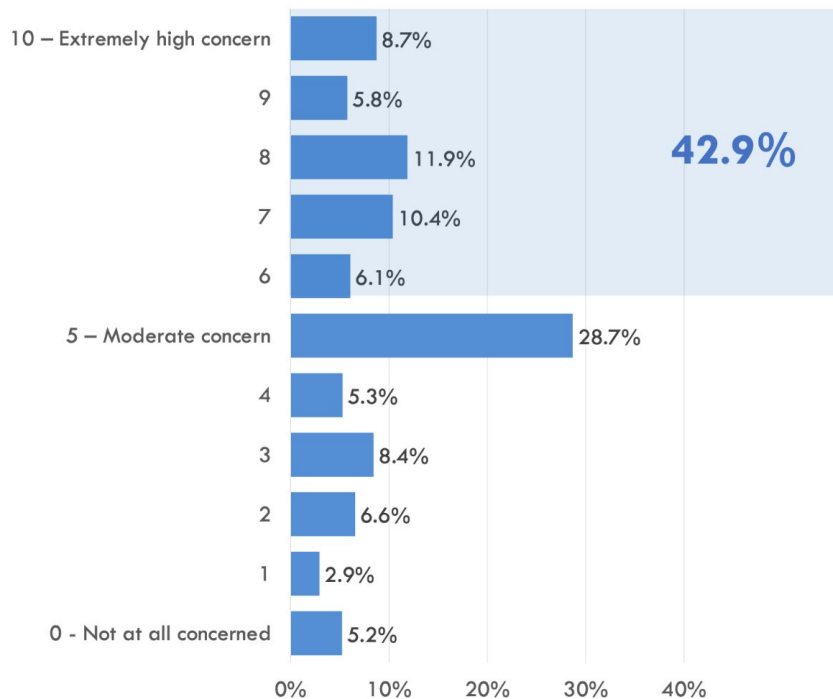


Safety When Traveling

Concerns About Personal Safety During Travel Within U.S.

Question: Typically, when you travel in the United States how concerned are you about your personal safety? (Use the scale below to rate your typical level of concern)

*(Base: All respondents, 4,002 completed surveys.
Data collected June 15-23, 2022.)*

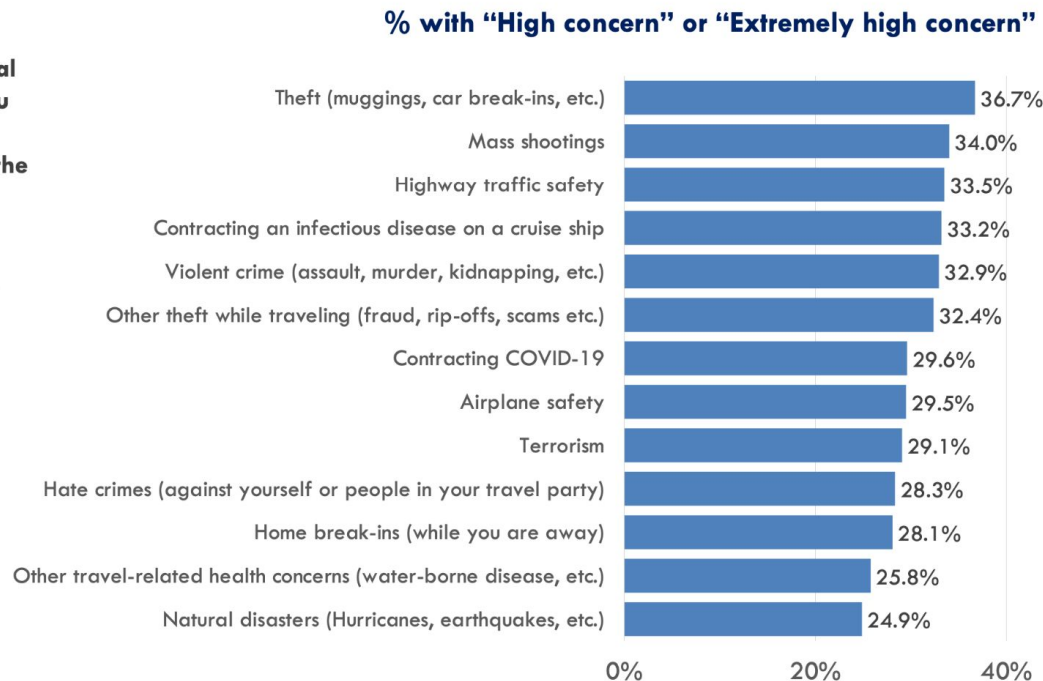


Safety Related Travel Concerns

Question: Tell us about your typical mindset when traveling. When you are traveling, how typically concerned are you about each of the following?

(Base: All respondents, 4,002 completed surveys.)

Data collected June 15-23, 2022.)

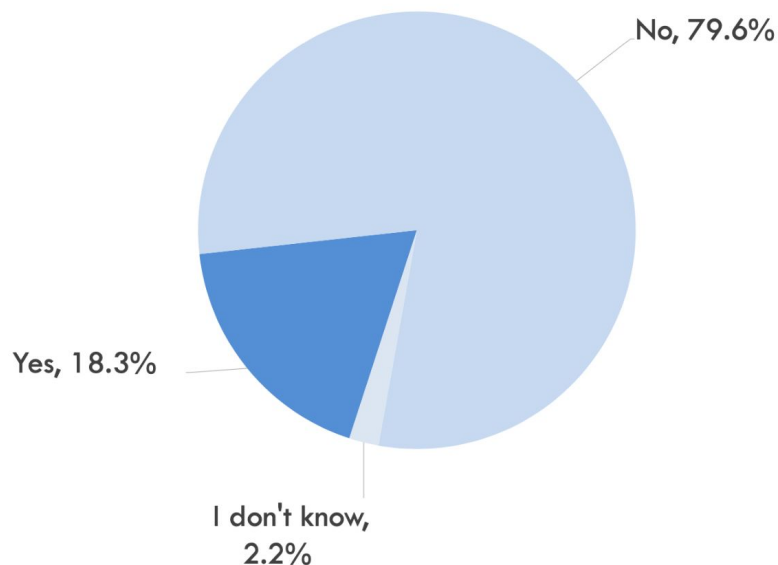


Traveling With a Weapon for Personal Safety

Question: In the PAST TWELVE (12) MONTHS, while traveling have you taken a weapon(s) with you for personal safety?

(Base: All respondents, 4,002 completed surveys.)

Data collected June 15-23, 2022.)



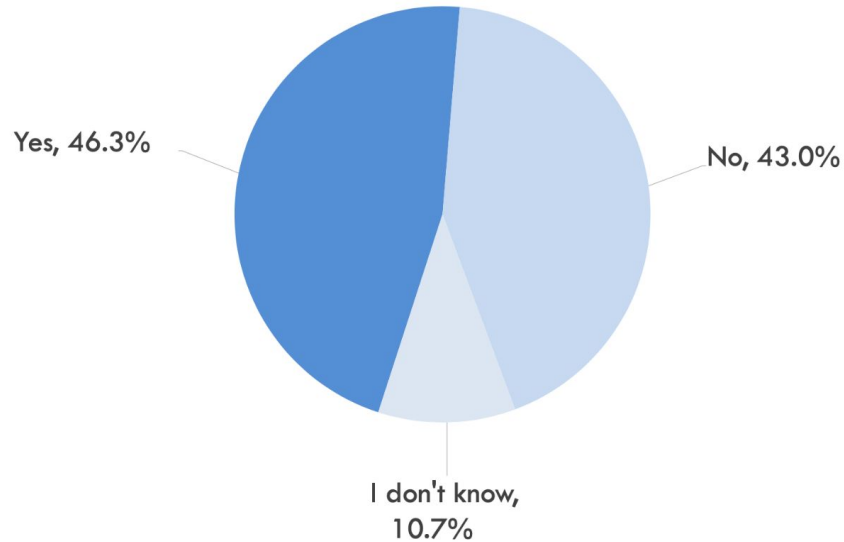
40% of survey respondents mentioned that as a result of homelessness issues they saw/experienced while traveling, they are less likely to return to that specific destination.

Homelessness Issue: Deterrent to Recommend

Question: As a result of the homelessness issues you saw/experienced while traveling, do you feel that you are less likely to recommend that your friends or relatives visit any specific destination?

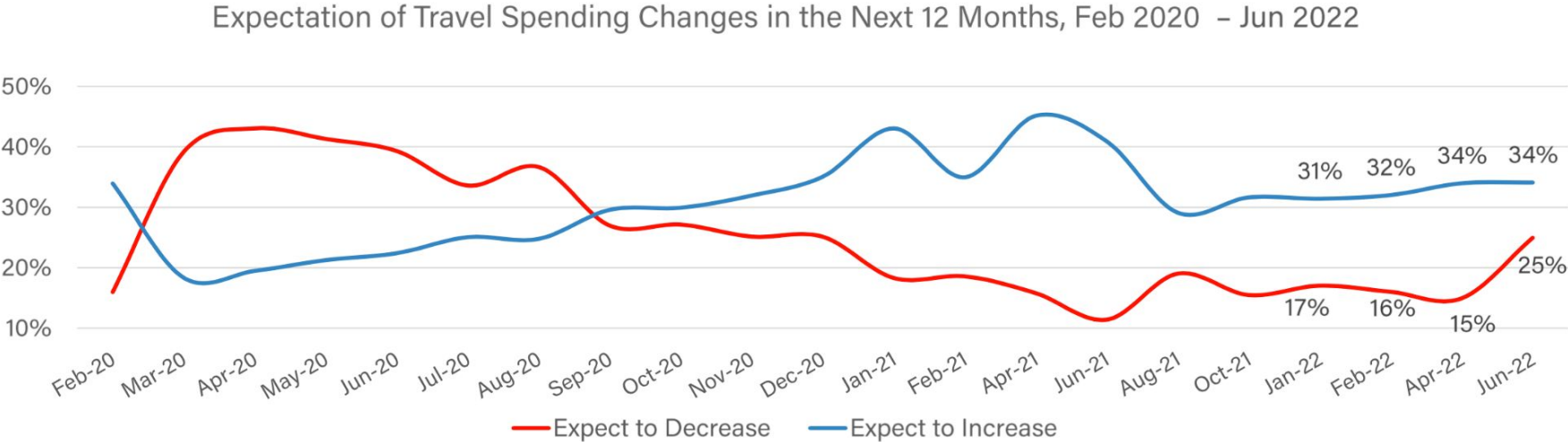
(Base: All respondents, 1,112 completed surveys.)

Data collected June 15-23, 2022.)



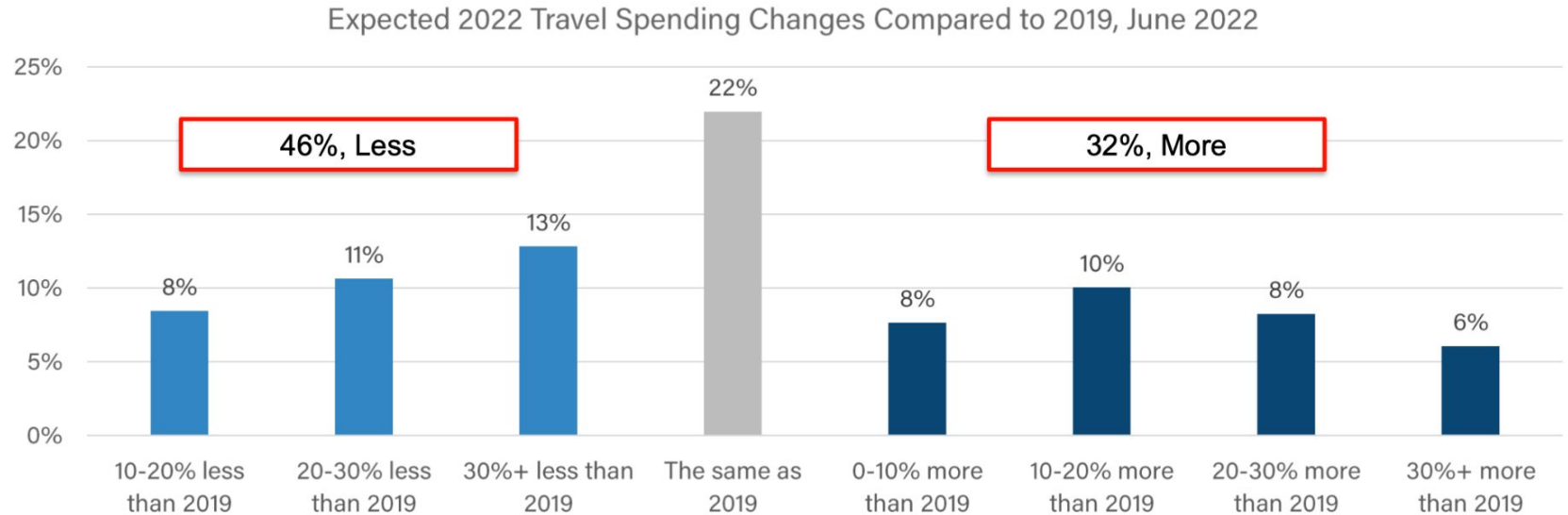
Additional Stuff

Expected Travel Spending Changes



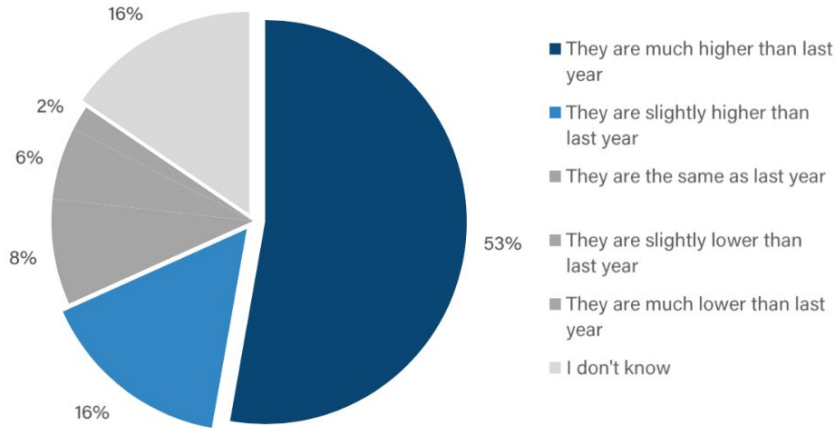
Monthly n = ~1000

Expected Travel Spending Changes: 2019 to 2022

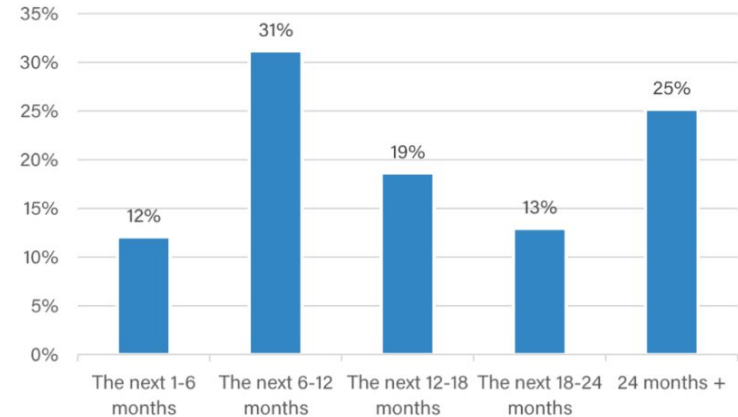


Perception of Increased Travel Prices

View on Travel Prices This Summer, June 2022



Attitude on How Long the High Travel Price will Last, June 2022



Passenger numbers also rose as flyers are paying more than ever for flights. The latest data from the flight cost tracker [Hopper](#) shows average airfare stands at about \$360. By contrast, in 2018 and 2019, average airfare never surpassed \$350.

Hopper reports that, on average, 23% of flights in June were delayed from departing U.S. airports, a 22% increase from May.

Still, it said, delay rates have begun improving recently because airlines are proactively canceling flights they are unable to service on time. As a result, cancellations have risen by 43% compared to June 2019.

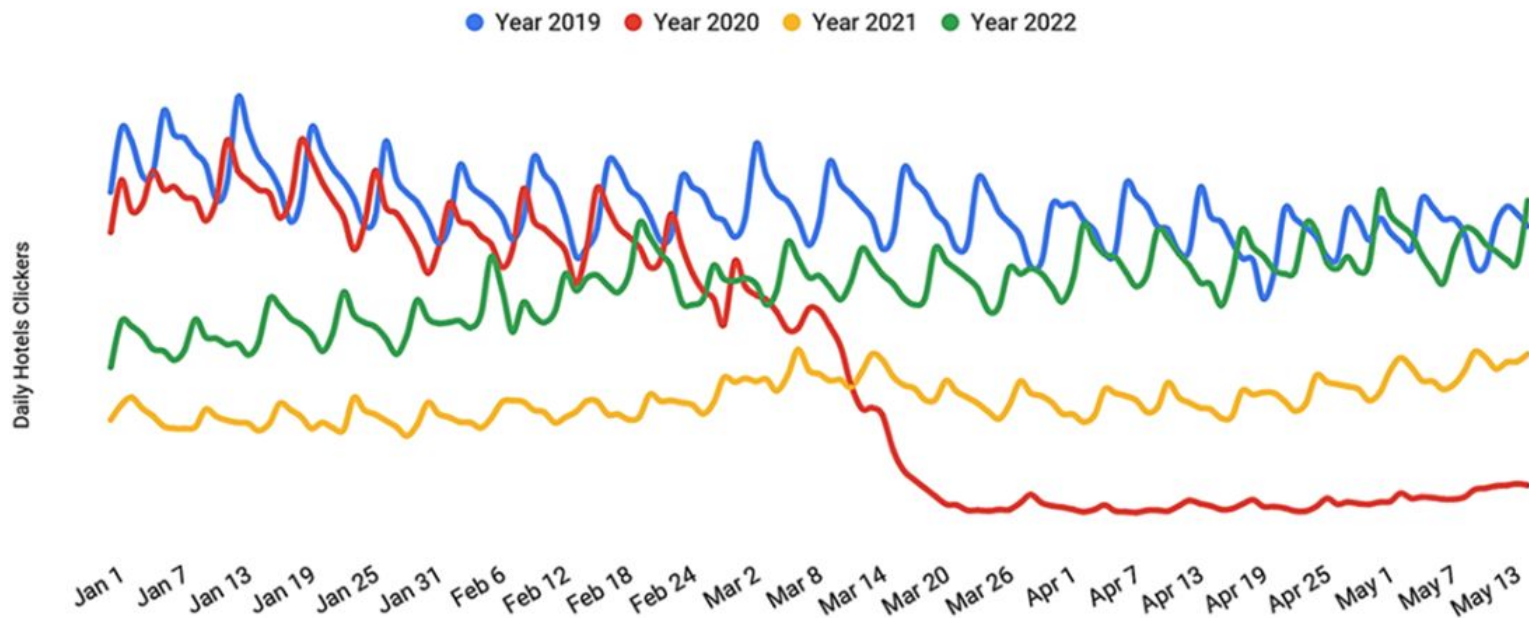
About 3% of all scheduled flights from the U.S. are resulting in cancellations, it said.

30.1% of travelers are more interested in traveling outside the US than inside the US.

More than a quarter (29%) of American travelers are now planning international stays, which is a healthy 45% increase compared to this time last year..

Travel Intent Since 2019

Daily Hotel Clickers Trending over time | 2019 - 2022



Source: Internal data; based on hotels Clickers, 1/1/19 - 5-15/22

48% of travel intent on Tripadvisor is for last minute trips, within the next 2 weeks.

With 29% of attraction page views on Tripadvisor being in Outdoors, Nature & Parks, there has been a 3% increase compared to before the pandemic.



Questions